

Human Resource Planning Guide for Managers

Introduction

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Overview

- What is human resource planning?
- Why is human resource planning important?
- Who is responsible for human resource planning and who should be involved?
- How often do we need to do human resource planning?
- How do we get started?
- Where can we find information about our current staff and workforce profile?
- What if we identify a need for more staff with particular skills and/or staff retention issues?
- What if we identify an oversupply of teachers in a particular grade or subject area?
- What do we do when we have completed human resource planning?
- What kinds of documentation do we need for our human resource planning?
- Annual Timeline

Human Resource Planning Template

Executive Summary	<i>Enter executive summary here, if required.</i>
HR Planning Step #1	
Analyze Your District's Human Resource Needs	
<input type="checkbox"/> Introduction	<i>Enter the reasons why you are human resource planning now.</i>
<input type="checkbox"/> Strategic background and school context	
School Profile	<i>Enter background about your schools such as grade levels, size (students and teachers), location, and student characteristics. Other things may include your infrastructure (i.e., new buildings, portables, etc.) that are important characteristics of your school.</i> Information source: School Strategic Plan
School Vision, Values, Mission, Goals	<i>Enter district / school vision, values, mission and goals</i> Information source: School Strategic Plan
<input type="checkbox"/> Environmental	<i>Enter your district's current environmental context. This could include drivers of change (policy or leadership), and emerging conditions that may impact on</i>

context	<p>your district and schools in the next 3-5 years.</p> <p>Describe your community profile, its key features and any changes that may impact the services you provide. This could include an increase in migrant students from interstate or overseas; increase or decrease in birth rates; new housing growth, stable or decline; changes in the main industries that your community are involved with; etc.</p> <p>Describe the following and any key factors that might influence them:</p> <ul style="list-style-type: none"> ○ School enrollments – ○ Demand for unique positions and/or skill sets – <p>Information source: School Strategic Plan, reports from school reviews, enrollment trend data, local government community profile and projections, school population projections, educator preparation program demand and supply report, school and state policies, etc.</p>
HR Planning Step #2 Gather Data	
<input type="checkbox"/> Workforce Profile: Overview	<p><i>Enter a snapshot of your school's workforce using quantitative and qualitative data. Remember to describe your TOTAL workforce, including non-teaching staff and volunteers. Some suggestions for what to include in your workforce profile data include:</i></p> <p><u>Quantitative</u></p> <ul style="list-style-type: none"> • Current workforce (numbers FTE and headcount) by role / subject areas, years of service • Summary performance data • Number of funded positions • Number of funded vacancies • Workforce characteristics (gender, age, education levels, performance levels, career stage, etc. • Workforce employment arrangements (full time, part time, job sharing, phased retirements, volunteers, etc.) • Mobility trends (number of staff exits in last 12 months and reasons for exits, e.g., promotion, resignations, maternity, paternity. Number of new hires • Turnover • Projected leave • Number of student teachers in training <p><u>Qualitative</u></p> <ul style="list-style-type: none"> • Climate survey results • 360 degree feedback surveys • Exit interviews

	<p><i>Once all this data has been gathered and examined, describe what you have found in your HR Plan and use the data to illustrate your findings. Be sure to discuss roles rather than individual people.</i></p> <p>Enter summary of findings here.</p>					
HR Planning Step #3 Assess Workforce Supply Gaps						
<input type="checkbox"/> Workforce Profile: Mission Critical / Hard-to-Staff Jobs	<p>Projected Demand and Supply</p> <p>Enter below roles you consider critical to your district / school meeting its objectives. Hard-to-staff positions are those where there is an insufficient supply to meet the demand. Or, there are enough people with the skills and qualifications to do this work but for a variety of reasons they are choosing to work in this job or school / district.</p> <p>For each hard-to-staff position describe the role required, how this links to your strategic objectives, when you anticipate this problem occurring, and why you think it is happening. You might also like to examine any unexpected resignations to understand more about what might be likely to occur in your school/district in the future.</p> <p>Add as many job roles as necessary for your circumstances.</p>					
[Enter mission-critical, hard-to-staff role here, e.g., Elementary Special Education Teacher]						
	Enter why these are mission-critical and hard-to-staff roles. Refer to your strategic plan.					
		2016-17	2017-18	2018-19	2019-20	2020-21
	Projected demand (best guess as to how many will be needed)					
	Projected supply (how many do you have now? how many will you be able to attract?)					
	Projected gap (difference between demand and supply)					
	Comments:					
[Enter mission-critical, hard-to-staff roles here, e.g., Classroom Teacher – Science Grades 9/10]						
	Enter why these are mission-critical and hard-to-staff roles. Refer to your strategic plan.					
		2016-17	2017-18	2018-19	2019-20	2020-21
	Projected demand (best guess as to how many will be needed)					

	Projected supply (how many do you have now? how many will you be able to attract?)					
	Projected gap (difference between demand and supply)					
	Comments:					
[Add rows to list any additional mission-critical, hard-to-staff roles]						
HR Planning Step #4						
Identify Workforce Strategies						
<input type="checkbox"/> HR Planning and Development Strategies Enter below what human resource planning strategies you would like to use to tackle the workforce issues identified previously in this plan along with accountabilities.						
HR Priority Area	HR Strategy <i>Enter for example, what you will do, how you will do it, how much it is likely to cost, which of your strategic goals this will support, and consequences if you do not carry out this strategy.</i>	Accountability <i>Enter for example, who and when this strategy will be carried out, under what conditions, and against which standards will results be evaluated.</i>			Partners <i>Enter for example, who the district will partner with to accomplish HR strategy (e.g., Teacher Prep programs)</i>	
Attract Talent						
Grow Talent						
Retain Talent						
HR Planning Step #5						
Monitor and Evaluate						
<input type="checkbox"/> Reporting, Monitoring and Review of Human Resource Plan						
	<i>Enter your plans to disseminate the information in your human resource plan across your district, community, etc.</i> <i>Enter your plans to monitor your workforce strategies to see if they are working and what mechanisms you will use to monitor.</i> <i>Enter how and when your human resource plan will be reviewed (e.g., in conjunction with the development of a new strategic plan? or with the development of your next budget?, etc.)</i> <i>Enter how improvements in the human resource planning process will occur.</i>					

Resources:

School Workforce Planning Template, Department of Education and Early Childhood Development, 2012

Workforce Planning Guide for Managers, Getting the right people at the right time with the right skills,
University Australia